Press Release

ITALIAN CAR MARKET SHOWED A POSITIVE PERFORMANCE IN MARCH: THIS RESULT WAS DISTORTED BY THE COMPARISON WITH AN UNPRECEDENTED NEGATIVE PERFORMANCE IN MARCH 2020, WHILE A 12.7% DROP WAS RECORDED COMPARED TO MARCH 2019

Good news regarding the extension to the implementation of the Single Document for the circulation and ownership of motor vehicles, now it is time to refinance the incentives for cars in the 61-135 g/km CO_2 range, close to being phased out, and for light commercial vehicles

Turin, April 1st 2021 – According to data published today by the Ministry for Infrastructure and Transportation, in March 2021, the Italian car market totalled 169,684 new vehicle registrations compared to the 28,415 units recorded in the same period last year - a month heavily affected by the first anti-Covid measures. In particular, the first weeks of a national lockdown that lasted for 41 days and blocked manufacturing plants and sales networks - closed at -85.4%.

The number of units registered in the first quarter of 2021 was 446,978, up 28.7% compared to the first quarter of 2020, which went down in history as the worst quarter ever.

"*After negative performances in January (-14%) and February (-12.3%), March showed a positive trend, albeit distorted by the comparison with an unprecedented March 2020 in terms of negative performance caused by the outbreak of the health emergency in our country* – states **Paolo Scudieri, President of ANFIA**. *Since, therefore, this is an unequal comparison, it makes more sense to compare this third month of 2021 to March 2019, a month with volumes that were already down (193,662 units), compared to which registrations were down 12.7%. A sign that the effects of the pandemic, with Italy divided into red and orange zones, are still affecting the recovery of the sector and a still uncertain economic situation that is also impacting consumer confidence and a continuing crisis in the supply of some raw materials.*

Nevertheless, today there is some good news, given that, with the approval of the DL Trasporti (the Transportation Law Decree) , an extension has been granted for the entry into force of the new regulations on the Single Vehicle Registration Documentation (Documento Unico di circolazione e proprietà degli autoveicoli). Initially envisaged to commence on 31st March, it has now moved to 30th June, as urgently requested by ANFIA and other associations of the automotive supply chain and designed to improve the efficiency of a digital system considered inefficient. This extension of the decree signals a genuine concern for our sector and, we would like to thank those institutions that have listened to our comments. It is now of paramount importance that the time left before the new system becomes fully operational should be used *effectively between the Ministries concerned and the automotive industry operators to overcome the deadlock and avoid a further potential negative impact on a market already in difficulty.*

Another fundamental step to be taken in the short term to support the recovery of the sector and continue along the path of sustainable development is the refinancing of incentives for cars in the 61-135 g/km CO_2 range that will soon come to an end. It is also necessary to make the ecobonus for vehicles up to 60 g/km CO_2 a longer-term solution, until 2026".

Looking at the **number of registrations by fuel type** in detail[1], the decline of diesel and petrol cars continues, with their market share gradually shrinking in favour of hybrid and electric cars.

For the second consecutive month, diesel cars failed to reach the 25% share threshold, accounting for 24.1% of the March market and a quarter of the sector in Q1 2021. The share of petrol cars was also lower than in previous months: 31.2% for the month and 33.3% for the first three months.

Registrations of alternative fuels, on the other hand, rose to 44.7% in March 2021 and 41.7% in Q1. Electrified cars accounted for more than a third of the market (36% for the month and 33.5% overall). Non-rechargeable hybrids made up 27.3% of the March market (for the second month in a row, their share was higher than that of diesel) and 26.9% overall. Rechargeable cars made up 8.7% of the total (plug-in hybrids 4.4% for the month and 3.6% for the quarter and electric cars 4.3% for the month and 3% for the three months). Finally, gas-powered vehicles accounted for 8.7% of the market in the third month of 2021 and 8.2% in the quarter. LPG vehicles had a market share of 6.1% for the month and 5.8% for the year-to-date. CNG vehicles accounted for 2.6% for the month and 2.4% for the first quarter.

The excellent performance of Fiat Panda, Lancia Ypsilon and Fiat 500 hybrids, which occupy the top three places in the mild/full hybrid segment, continued. Among the PHEVs registered, Jeep Renegade and Jeep Compass plug-in took the top two sales positions, while Fiat 500 was the second best-selling electric model.

Referring to the **market by segments**, in March, both small and super-utility cars accounted for 37.5% of the total market, while in the first four months, their market share was 40.2%. The three best-selling models were Fiat Panda, Fiat 500 (both super-utility cars) and Lancia Ypsilon (small car). Vehicles in the medium segments had a market share of 10.5% in March and 10.1% in the first quarter of 2021.

[1] Provisional Data

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SUVs, as a sector, gained 42.5% market share in March and 42.6% in the first quarter of 2021. In detail, small SUVs accounted for 20.7% of the monthly market (Jeep Renegade and Fiat 500X being the two best-selling models), compact SUVs 16.5% (Peugeot 3008 in second place and Jeep Compass in fourth place), medium SUVs 4% (Alfa Romeo Stelvio the best-selling model), while sales of large SUVs accounted for 1.3% of the total. Stellantis Group cars account for 29.6% of SUV sales.

MPVs accounted for 3.2% of the market in March and 3.6% in the first quarter. Lastly, sports, premium, and luxury cars accounted for 1% of both the month and the quarter.

According to the Italian National Institute of Statistics (ISTAT) survey, in March[2] **consumer confidence index** (base 2010=100) is estimated to decrease from 101.4 to 100.9 and the overall **business confidence index** (IES) to increase from 93.3 to 93.9.

Concerning consumer confidence, the index for current purchasing opportunities for durable goods, including cars, also increased compared to February 2021 (from -47.5 to -46.4).

According to the latest available ISTAT data, in March, the **national consumer price index** rose by 0.3% monthly and by 0.8% year-to-date (from +0.6% in February). The increase in inflation was mainly due to a reversal in trends for unregulated energy goods, which rose from -3.6% to +1.7%. To a lesser extent, the increase in transport services (from +1% to +2.2%) also increased inflation.

In the sector of unregulated energy goods, looking at trends in fuel prices, there was a reversal in the trends in **petrol prices** (from -4% to +2.7%; +4.2% compared to February) and **diesel prices** (from -5.5% to +1.7%; +4.4% on the previous month), while the growth in **other fuels** rose (from +1% to +4.5%; +1.7% monthly).

The **Stellantis Group** registered 68,449 vehicles (+742.4%) for the month, with a market share of 40.3%. This growth is more than the combined market and the best performance by any other group during the month.

Total vehicle registrations since the beginning of 2021 are 180,411 units (+25.8%), representing a market share of 40.4%.

[2] Beginning from January 2021, Istat edits the methodology for the prevision of consumers survey variables. Time series of response percentage frequencies, balances, and climates were calculated with the new estimator by calibration and are made available beginning in January 1998.

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There are eight Stellantis Group models in the **top ten for March**, with Fiat Panda still leading the list (10,915 units), followed in second place by Jeep Renegade (5,343), which climbs four places from Februarys top ten, and in third place by Lancia Ypsilon (5,093). In fourth place was Fiat 500X (4,997), which moved up three places then followed in fifth by Fiat 500 (4,779) and in seventh by Citroen C3 (4,132). Rounding out the top ten are Opel Corsa (3,382) and Peugeot 208 (3,243) in ninth and tenth place, respectively.

The **used car market** totalled 331,779 transfers of ownership before mini transfers to dealers in March 2021, compared to 143,230 transfers recorded in March 2020. In the first quarter of 2021, there were 894,069 transfers of ownership, 9.2% more than in the same period of 2020.

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ANFIA – Italian Association of the Automotive Industry
Born in March 1912, over these one hundred years, ANFIA mission has always been to represent the interests of its associate members and ensure effective communication between the Italian motor vehicle industries on the one hand, and the Public Administration and Italian political bodies on the other, with regard to all technical, economic, fiscal, legal, statistical and quality-related issues referred to the automotive sector. The Association is structured in three product-based Groups, each one chaired by a President. Components: motor vehicle parts and components manufacturers; Car Coachbuilders and Designers: companies working in the sector of design, engineering and style of motor vehicles and/or parts and components for the automotive sector; Motor vehicles: motor vehicles manufacturers in general, including trucks, trailers, camper vans, special means of transport.

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The Automotive Production Chain in Italy
5,546 companies
278,000 employees (direct and indirect), more than 7% of the employees in the Italian manufacturing sector
106.1 billion Euros of turnover, which means 11% of the Italian manufacturing sector turnover and of 6.2% of the Italian GDP
76.3 billion Euros of tax levy of motorization

Comunicato Stampa

ANFIA Associazione Nazionale Filiera Industria Automobilistica

ITALIA - IMMATRICOLAZIONI AUTOVETTURE

ITALY - NEW CAR REGISTRATIONS

dati provvisori/*provisional data*

	MARZO MARCH				VAR. % % CHG.	GENNAIO/MARZO JANUARY/MARCH				VAR. % % CHG.
MARCA/MAKE	2021	%	2020	%	21/20	2021	%	2020	%	21/20
STELLANTIS Group*	***68.449***	***40,3***	***8.125***	***28,6***	***+742,4***	***180.411***	***40,4***	***143.390***	***41,3***	***+25,8***
FIAT	26.400	15,6	2.803	9,9	+841,8	69.411	15,5	56.483	16,3	+22,9
PEUGEOT	11.446	6,7	1.500	5,3	+663,1	31.328	7,0	22.191	6,4	+41,2
CITROEN	8.864	5,2	1.033	3,6	+758,1	24.240	5,4	17.920	5,2	+35,3
OPEL	7.397	4,4	824	2,9	+797,7	19.367	4,3	15.679	4,5	+23,5
JEEP	7.348	4,3	1.071	3,8	+586,1	18.465	4,1	12.722	3,7	+45,1
LANCIA	5.093	3,0	514	1,8	+890,9	13.007	2,9	12.715	3,7	+2,3
ALFA ROMEO	1.240	0,7	272	1,0	+355,9	3.042	0,7	3.975	1,1	-23,5
DS	434	0,3	79	0,3	+449,4	1.077	0,2	1.385	0,4	-22,2
MASERATI	227	0,1	29	0,1	+682,8	474	0,1	320	0,1	+48,1
VW Group	***26.498***	***15,6***	***4.777***	***16,8***	***+454,7***	***69.780***	***15,6***	***58.656***	***16,9***	***+19,0***
VOLKSWAGEN	13.690	8,1	2.320	8,2	+490,1	35.836	8,0	33.567	9,7	+6,8
AUDI	6.427	3,8	1.211	4,3	+430,7	17.166	3,8	12.074	3,5	+42,2
SKODA	2.978	1,8	724	2,5	+311,3	8.571	1,9	6.168	1,8	+39,0
SEAT	2.717	1,6	284	1,0	+856,7	6.310	1,4	5.285	1,5	+19,4
PORSCHE	665	0,4	216	0,8	+207,9	1.826	0,4	1.478	0,4	+23,5
LAMBORGHINI	21	0,0	22	0,1	-4,5	71	0,0	84	0,0	-15,5
RENAULT Group	***14.230***	***8,4***	***2.923***	***10,3***	***+386,8***	***37.185***	***8,3***	***30.173***	***8,7***	***+23,2***
RENAULT	8.706	5,1	1.705	6,0	+410,6	22.184	5,0	19.022	5,5	+16,6
DACIA	5.524	3,3	1.218	4,3	+353,5	15.001	3,4	11.151	3,2	+34,5
FORD	***10.776***	***6,4***	***1.765***	***6,2***	***+510,5***	***29.345***	***6,6***	***21.677***	***6,2***	***+35,4***
TOYOTA Group	***9.274***	***5,5***	***1.236***	***4,3***	***+650,3***	***26.788***	***6,0***	***16.946***	***4,9***	***+58,1***
TOYOTA	8.784	5,2	1.144	4,0	+667,8	25.347	5,7	15.926	4,6	+59,2
LEXUS	490	0,3	92	0,3	+432,6	1.441	0,3	1.020	0,3	+41,3
HYUNDAI Group	***8.809***	***5,2***	***2.415***	***8,5***	***+264,8***	***22.812***	***5,1***	***18.682***	***5,4***	***+22,1***
HYUNDAI	4.644	2,7	783	2,8	+493,1	11.729	2,6	8.034	2,3	+46,0
KIA	4.165	2,5	1.632	5,7	+155,2	11.083	2,5	10.648	3,1	+4,1
BMW Group	***7.907***	***4,7***	***1.074***	***3,8***	***+636,2***	***21.327***	***4,8***	***14.970***	***4,3***	***+42,5***
BMW	5.745	3,4	725	2,6	+692,4	16.133	3,6	11.225	3,2	+43,7
MINI	2.162	1,3	349	1,2	+519,5	5.194	1,2	3.745	1,1	+38,7
DAIMLER Group	***6.693***	***3,9***	***1.770***	***6,2***	***+278,1***	***16.302***	***3,6***	***11.373***	***3,3***	***+43,3***
MERCEDES	5.846	3,4	1.605	5,6	+264,2	14.405	3,2	10.574	3,0	+36,2
SMART	847	0,5	165	0,6	+413,3	1.897	0,4	799	0,2	+137,4
SUZUKI	***3.776***	***2,2***	***1.210***	***4,3***	***+212,1***	***12.194***	***2,7***	***7.274***	***2,1***	***+67,6***
NISSAN	***3.401***	***2,0***	***684***	***2,4***	***+397,2***	***8.611***	***1,9***	***7.730***	***2,2***	***+11,4***
VOLVO	***1.926***	***1,1***	***654***	***2,3***	***+194,5***	***5.229***	***1,2***	***3.538***	***1,0***	***+47,8***
JAGUAR LAND ROVER Grou	***2.440***	***1,4***	***666***	***2,3***	***+266,4***	***4.607***	***1,0***	***4.679***	***1,3***	***-1,5***
LAND ROVER	1.771	1,0	496	1,7	+257,1	3.462	0,8	3.480	1,0	-0,5
JAGUAR	669	0,4	170	0,6	+293,5	1.145	0,3	1.199	0,3	-4,5
MAZDA	***1.463***	***0,9***	***147***	***0,5***	***+895,2***	***3.605***	***0,8***	***2.416***	***0,7***	***+49,2***
TESLA	***1.366***	***0,8***	***424***	***1,5***	***+222,2***	***1.703***	***0,4***	***780***	***0,2***	***+118,3***
HONDA	***547***	***0,3***	***142***	***0,5***	***+285,2***	***1.657***	***0,4***	***1.644***	***0,5***	***+0,8***
DR	***570***	***0,3***	***69***	***0,2***	***+726,1***	***1.561***	***0,3***	***593***	***0,2***	***+163,2***
MITSUBISHI	***380***	***0,2***	***119***	***0,4***	***+219,3***	***1.071***	***0,2***	***1.367***	***0,4***	***-21,7***
SUBARU	***281***	***0,2***	***87***	***0,3***	***+223,0***	***620***	***0,1***	***508***	***0,1***	***+22,0***
FERRARI	***65***	***0,0***	***14***	***0,0***	***+364,3***	***166***	***0,0***	***136***	***0,0***	***+22,1***
ALTRE	***833***	***0,5***	***114***	***0,4***	***+630,7***	***2.004***	***0,4***	***874***	***0,3***	***+129,3***
TOTALE MERCATO	169.684	100,0	28.415	100,0	+497,2	446.978	100,0	347.406	100,0	+28,7

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/03/2021

* Fino al 2020 Alfa Romeo, Fiat, Jeep e Lancia erano conteggiati nel Gruppo FCA, Citroen, DS, Opel e Peugeot nel Gruppo PSA

ITALIA - IMMATRICOLAZIONI AUTOVETTURE - Top ten

ITALY - NEW CAR REGISTRATIONS - Top ten

dati provvisori/*provisional data*

TOP 10

N.	MARCA *Make*	MODELLO *Model*	MARZO 2021[1] *MARCH 2021*
1	FIAT	PANDA	10.915
2	JEEP	RENEGADE	5.343
3	LANCIA	YPSILON	5.093
4	FIAT	500X	4.997
5	FIAT	500	4.779
6	TOYOTA	YARIS	4.622
7	CITROEN	C3	4.132
8	FORD	PUMA	4.064
9	OPEL	CORSA	3.382
10	PEUGEOT	208	3.243

N.	MARCA *Make*	MODELLO *Model*	GEN/MAR 2021 *JAN/MAR 2021*
1	FIAT	PANDA	36.399
2	LANCIA	YPSILON	13.009
3	TOYOTA	YARIS	12.763
4	FIAT	500	12.489
5	JEEP	RENEGADE	12.154
6	CITROEN	C3	11.183
7	FIAT	500X	10.946
8	FORD	PUMA	10.374
9	PEUGEOT	208	9.565
10	OPEL	CORSA	9.345

Fonte: CED - Ministero dei Trasporti

I dati rappresentano le risultanze dell'archivio nazionale dei veicoli al 31/03/2021

[1] Con versione Elettrica e marchio Abarth, non comprese nella top10 del Ministero, Fiat 500 occuperebbe la seconda posizione

[2] Comprende versione Elettrica e marchio Abarth

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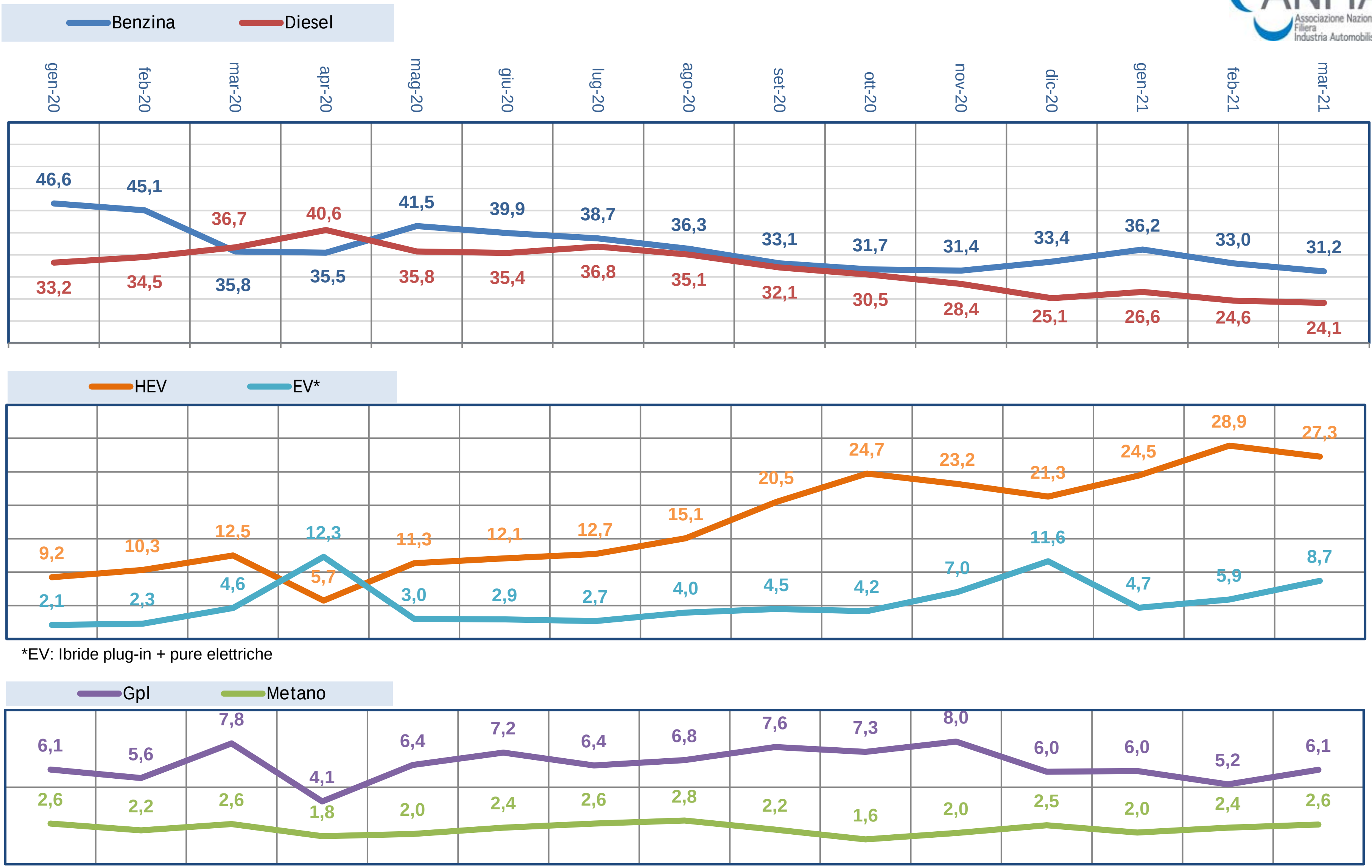
ITALIA - IMMATRICOLAZIONI AUTOVETTURE NUOVE PER ALIMENTAZIONE - TREND MENSILE

Italy - New car registrations by fuel - Monthly trend



Elaborazioni ANFIA su dati del Ministero delle Infrastrutture e dei Trasporti al 31.03.2021
(Aut.Min. D07161/H4)

ITALIA - TRASFERIMENTI DI PROPRIETA' AUTOVETTURE
ITALY - USED CARS: CHANGES IN OWNERSHIP

dati provvisori /provisional data

	MARZO *MARCH*				VAR. % *% CHG.*	GENNAIO/MARZO *JANUARY/MARCH*				VAR. % *% CHG.*
MARCA/*MAKE*	2021	%	2020	%	21/20	2021	%	2020	%	21/20
FIAT	77.392	23,33	31.862	22,25	142,90	211.961	23,71	187.634	22,92	12,97
FORD	20.572	6,20	9.603	6,70	114,22	56.067	6,27	54.588	6,67	2,71
VOLKSWAGEN	19.258	5,80	8.367	5,84	130,17	52.697	5,89	48.100	5,88	9,56
OPEL	16.810	5,07	7.905	5,52	112,65	45.391	5,08	44.934	5,49	1,02
MERCEDES	17.161	5,17	7.532	5,26	127,84	44.944	5,03	41.676	5,09	7,84
LANCIA	15.438	4,65	6.851	4,78	125,34	42.283	4,73	38.841	4,74	8,86
RENAULT	14.736	4,44	6.716	4,69	119,42	39.591	4,43	37.824	4,62	4,67
CITROEN	13.961	4,21	6.358	4,44	119,58	37.658	4,21	36.404	4,45	3,44
TOYOTA	13.985	4,22	6.021	4,20	132,27	37.482	4,19	34.166	4,17	9,71
PEUGEOT	13.277	4,00	5.989	4,18	121,69	35.371	3,96	34.126	4,17	3,65
AUDI	11.639	3,51	4.943	3,45	135,46	31.162	3,49	28.281	3,45	10,19
BMW	11.364	3,43	5.137	3,59	121,22	30.561	3,42	28.569	3,49	6,97
NISSAN	11.173	3,37	4.615	3,22	142,10	28.840	3,23	25.626	3,13	12,54
ALFA ROMEO	9.414	2,84	4.060	2,83	131,87	25.427	2,84	23.574	2,88	7,86
SMART	8.962	2,70	3.573	2,49	150,83	24.477	2,74	20.891	2,55	17,17
HYUNDAI	6.416	1,93	2.694	1,88	138,16	16.412	1,84	14.471	1,77	13,41
MINI	5.563	1,68	2.393	1,67	132,47	14.700	1,64	13.018	1,59	12,92
SUZUKI	5.159	1,55	2.085	1,46	147,43	14.466	1,62	12.312	1,50	17,50
LAND ROVER	5.444	1,64	2.224	1,55	144,78	14.020	1,57	11.828	1,44	18,53
JEEP	3.516	1,06	1.563	1,09	124,95	9.363	1,05	8.914	1,09	5,04
KIA	3.249	0,98	1.533	1,07	111,94	8.683	0,97	8.363	1,02	3,83
VOLVO	2.904	0,88	1.249	0,87	132,51	7.561	0,85	6.820	0,83	10,87
DACIA	2.515	0,76	1.046	0,73	140,44	6.704	0,75	5.963	0,73	12,43
SEAT	2.121	0,64	1.044	0,73	103,16	5.777	0,65	5.810	0,71	-0,57
MITSUBISHI	1.595	0,48	627	0,44	154,39	4.403	0,49	3.650	0,45	20,63
PORSCHE	1.661	0,50	568	0,40	192,43	4.126	0,46	3.280	0,40	25,79
JAGUAR	1.485	0,45	607	0,42	144,65	3.554	0,40	3.213	0,39	10,61
HONDA	1.247	0,38	557	0,39	123,88	3.464	0,39	3.235	0,40	7,08
MAZDA	1.185	0,36	598	0,42	98,16	3.245	0,36	3.552	0,43	-8,64
SKODA	1.057	0,32	496	0,35	113,10	2.912	0,33	2.787	0,34	4,49
SUBARU	566	0,17	245	0,17	131,02	1.601	0,18	1.415	0,17	13,14
DR	394	0,12	170	0,12	131,76	1.002	0,11	1.156	0,14	-13,32
MASERATI	266	0,08	106	0,07	150,94	695	0,08	547	0,07	27,06
TESLA MOTORS	146	0,04	18	0,01	711,11	284	0,03	82	0,01	246,34
ALTRE	10.148	3,06	3.875	2,71	161,88	27.185	3,04	22.968	2,81	18,36
TOTALE	**331.779**	100,0	**143.230**	100,0	**131,64**	**894.069**	100,0	**818.618**	100,0	**9,22**

I dati si riferiscono alle certificazioni di avvenuto trasferimento di proprietà rilasciate dagli uffici della Motorizzazione
nel mese di riferimento e rappresentano le risultanze dell'Archivio Nazionale dei Veicoli alla data del 28/02/2021